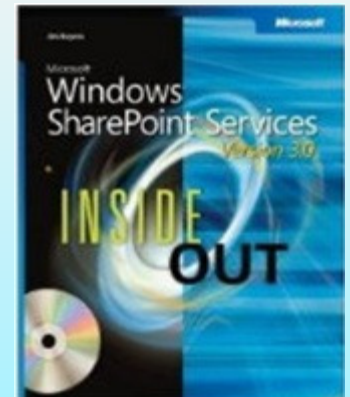# Implementing a SharePoint Center of Excellence (SharePoint COE)

Organizations throughout the globe have implemented or will implement Microsoft SharePoint as a primary collaboration or content management solution within their organization. EPC Group has developed proprietary SharePoint Center of Excellence methodologies that will guarantee SharePoint is reliable, useable, scalable, and maintainable as well as a core foundation of your organization to ensure its long-term success.

Session Overview…

Presenter: Errin O'Connor

- Founder of EPC Group.net
  - One of the nation's leading SharePoint implementation and custom .NET development firms

- Author of *Windows SharePoint Services 3.0 Inside & Out* by Microsoft Press

- Has completed 130+ SharePoint Implementations in the Past 8 years

- Has worked on some of the largest SharePoint deployments to date (200,000+ Users)

- Spoke at the SharePoint Conference 2009 in Las Vegas on SharePoint 2010 Governance and Your Future SharePoint Roadmap

- Writing the new book for Microsoft on SharePoint 2010 called "SharePoint 2010 Inside Out"

SharePoint's Adoption Rate:
The Need for a SharePoint Center of Excellence (COE)

- **55% of organizations have implemented or are considering implementing SharePoint**: (*Global Intranet Trends 2009 report - 227 participant organizations*)

- **46% of those companies using social media on the intranet are using SharePoint:** (*Intranet 2.0 Global Survey – 430+ participant organizations*)

- **Only 47% of organizations have a defined governance model** (Intranet 2.0 Global Survey)

- **70% use at the department level; 38% are currently using it at the enterprise level but plan to increase their adoption:** (*AIIM*)

Take **Advantage** of SharePoint's Toolbox

- SharePoint is like this massive toolbox full of a full assortment of tools but it is really up to the business stakeholders, SharePoint architects, and Power Users to make sure the users have the right tools they need.

Key Pillars of a SharePoint Center of Excellence: Your Current State

Organization's must make certain key strategies, methodologies, support processes, and documentation are put in place to ensure a SharePoint Center of Excellence can be achieved. It's important to identify where you currently are with your organization's SharePoint implementation.

Organizations are typically in one of the following situations:

- Considering Implementing Microsoft SharePoint within the organization (and may also be curious how the upcoming SharePoint 2010 may affect your initiative)
- In the process of implementing Microsoft SharePoint 2007
- Having already implemented SharePoint and it is taking off faster than you could have ever imagined
- Having already implemented SharePoint and key strategies such as governance were not properly implemented and you concerned it may become difficult to manage

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What Is Your Organization Trying To Accomplish?

Is your organization's SharePoint deployment a:

- Intranet Solution
- Enterprise Content Management System
- Knowledge Management Solution
- Collaboration Solution
- Internet-Facing or Extranet-Facing Solution
- Business Process Automation Platform (i.e. Workflow)
- Application Development Platform
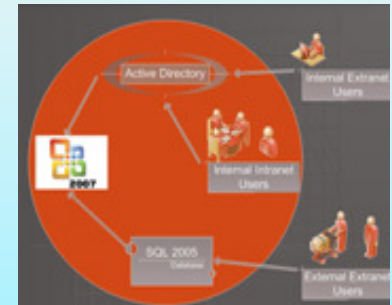
More Than Likely It's a Hybrid

Probable Answer:

- **A Hybrid of all of the above**

More than likely it's a Hybrid of all of the above…
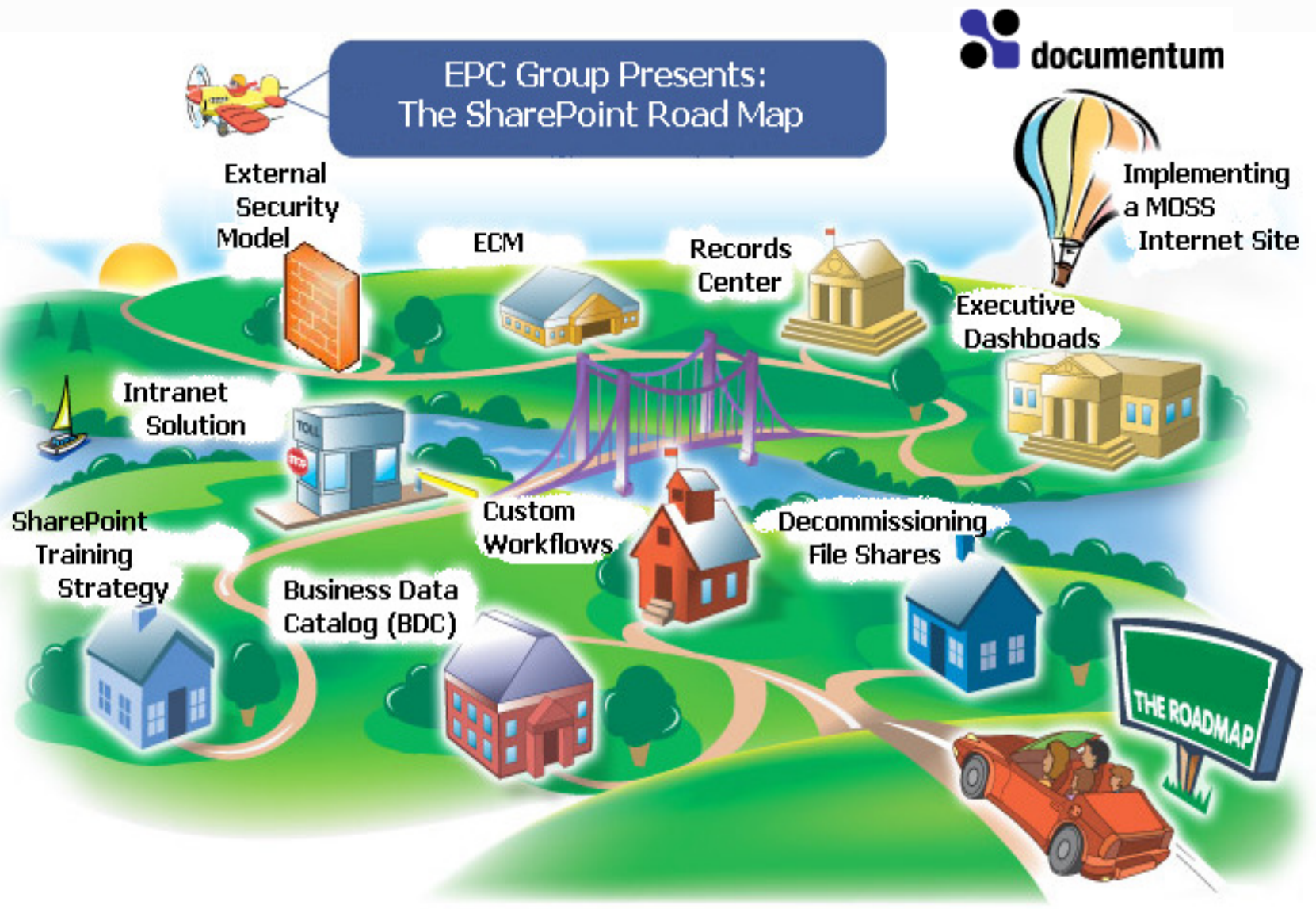
Your organization may want to:

- Deploy an Intranet solution for Phase 1
- Continue building out the SharePoint solution by adding an Enterprise Content Management Solution for Phase 2
- Add External Access and Custom Workflows for Phase 3
- Use SharePoint as the Application Development Platform for the entire organization for Phase 4

SharePoint Roadmap Development

SharePoint Roadmap Development

SharePoint Roadmap Development

SharePoint Roadmap Development

SharePoint Roadmap Development

Key Pillars of a SharePoint Center of Excellence (COE)

EPC Group's SharePoint Center of Excellence (COE) methodologies consist of several key pillars:

- The development a SharePoint Roadmap (3, 6, 12, 18, 24 ,36 months)
- Development of a SharePoint Governance Strategy
  - Not only the development but the enforcement of "Operational" SharePoint Governance
    - **"Not only how the ship works but how to drive the ship, run the ship, and how to maintain the ship"**
- Implementing SharePoint as a Platform so that it can evolve into a "Hybrid" solution if needed
  - Architect a solution that will not just support Phase 1 or Phase 2's objectives but will support the ever evolving business and functional requirements of the organization
- Implementing the Gallery Approach
  - A Workflow Gallery, a Web Part Gallery, a Master Page Gallery, etc...
    - Reuse what works within the organization across multiple divisions, departments, etc.

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Key Pillars of a SharePoint Center of Excellence (COE)

EPC Group's SharePoint Center of Excellence (COE) methodologies consist of several key pillars:

- **Implement a Core Content Type (metadata) Strategy from the beginning**
  - If this is not done in the initial phases of your SharePoint initiative, it will become more and more difficult to implement this strategy as additional content is saved within SharePoint on a daily basis
- Implementation of a:
  - Charge Back Model for SharePoint so that departments can assist IT in covering the cost of providing this powerful service
  - Communication and Training Strategy for SharePoint
  - Power User Strategy for your organization
  - Site Provisioning Strategy for your organization
  - Mobile SharePoint Strategy for your organization
    - How Vaultus Mobile Technology can spawn SharePoint Collaboration within your organization like never before!

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SharePoint as a Service (SPaaS)

You've heard of software as a service (SaaS); now it's time to think about SharePoint as a service (SPaaS).

Possible "SPaaS" in your organization:

- Intranet Service
- Enterprise Content Management Service
- Knowledge Management Service
- Extranet Services (i.e. Customer or Partner Portal)
- Workflow Service
- Application Development Service (i.e. Utilizing SharePoint as the "one-stop-shop" to house all your organization's applications)

Your SharePoint platform should be built as a service to meet the business and functional requirements of your organization.

A SharePoint COE:
"SharePoint as a Service"

Following the "SharePoint as a Service" approach will also help you develop reusable galleries of features and solutions.

If your organization is trying to automate manual business processes with workflows, I would recommend building a core set of workflows that can be reused or "slightly modified" to meet the needs of other departments, business units, or employees.

For example:

- Workflow Service (i.e. The development of a reusable workflow gallery)
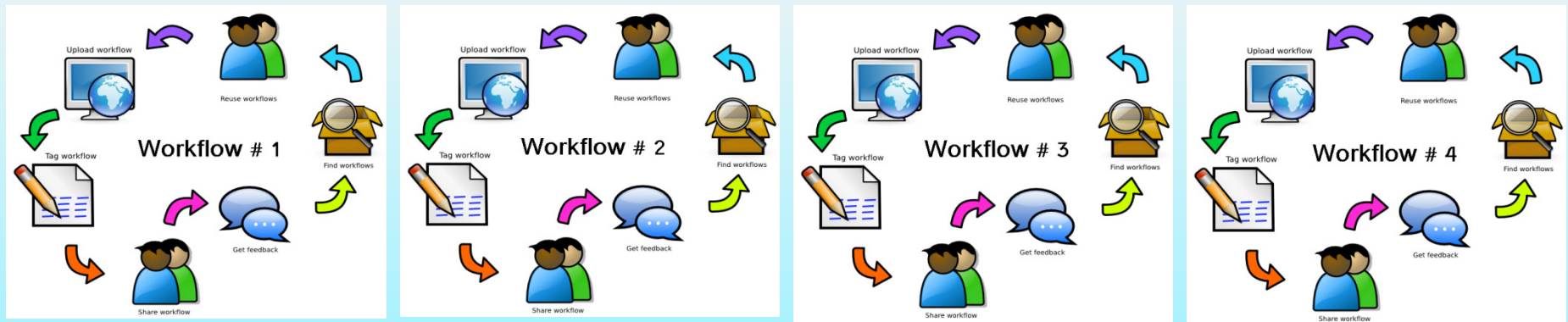
SharePoint Should Be Implemented as a Platform

Regardless if your organization is trying to accomplish **ONE** or even **ALL** of the following with your SharePoint implementation:

For example:

- Intranet Service (Platform)
- Enterprise Content Management Service (Platform)
- Knowledge Management Service (Platform)
- Extranet Service (Platform)
- Workflow Service (Platform)
- Application Development Service (Platform

SharePoint must be implemented as a **Platform** so that it can accomplish any of the goals listed above without ever having be rearchitected.

Designing The SharePoint Platform with Future Phases in Mind

While following the phased SharePoint approach, make sure to develop a SharePoint roadmap and have the "Big Picture" in mind for what SharePoint will ideally become within your organization.

- **Architect placeholders or "Buckets of Functionality" for future phases**

Designing The SharePoint Platform with Future Phases in Mind

- The goal of Phase 1 may be to rollout a company wide SharePoint intranet

- If Phase 1 is designed without taking into consideration a possible Phase 2 ECM or Knowledge Management initiative that the organization has planned, SharePoint may have to be rearchitected at significant cost to the organization in Phase 2.
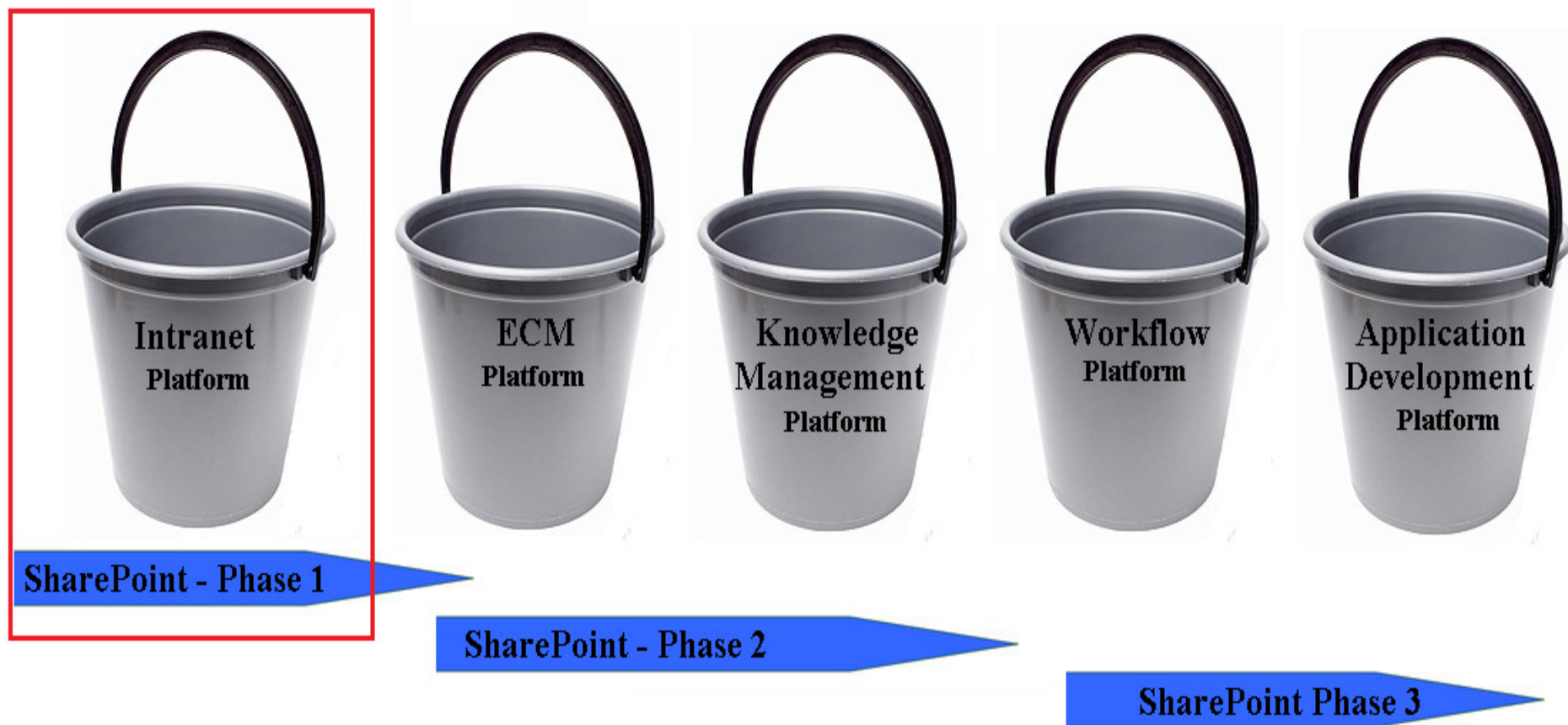
Designing The SharePoint Platform with Future Phases in Mind

- Content Type (Metadata) design should be addressed as soon as possible.

- If thousands of documents are uploaded into SharePoint in Phase 1 and Content Types (Metadata) were not present, chances are that no user will ever go back after the fact to properly classify this content.
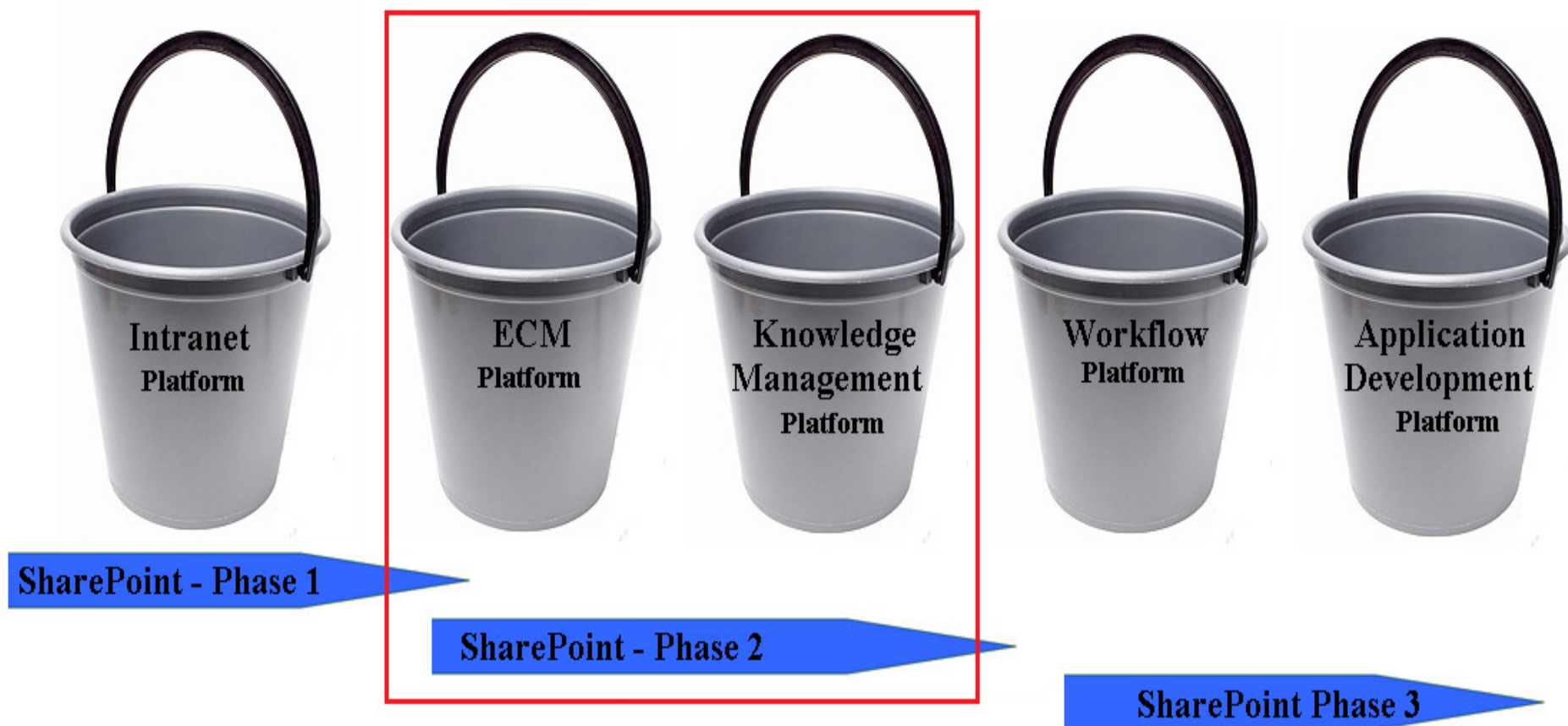
Designing The SharePoint Platform with Future Phases in Mind

You must take into consideration during Phase 1 of any SharePoint initiative:

- Site Hierarchy and Navigational Requirement (For Current and Future Phases)

- Content Types (Metadata) that will be captured in future phases

- Site Collections Requirements

- Content Databases (Sizing Requirements)

Buckets of Functionality (Placeholders for Future Phases)

Intranet Platform | ECM Platform | Knowledge Management Platform | Workflow Platform | Application Development Platform

SharePoint Containment Hierarchy

Farm

↓

Servers
Web Front End, APP, SQL

↓

Web Applications
Central Admin, SSP Admin, Content

↓

Databases
Content, Config, SSP, Search

↓

Site Collections
Internet, Intranet Portal, Wikis, Blogs, Team, Doc, Mtg

↓

Sites
Wikis, Blogs, Team, Doc, Mtg

↓

Lists
Doc Lib, Pages, Events, Discussions, Surveys, etc...

↓

Items
Files, calendar items, contacts, customers, images, custom
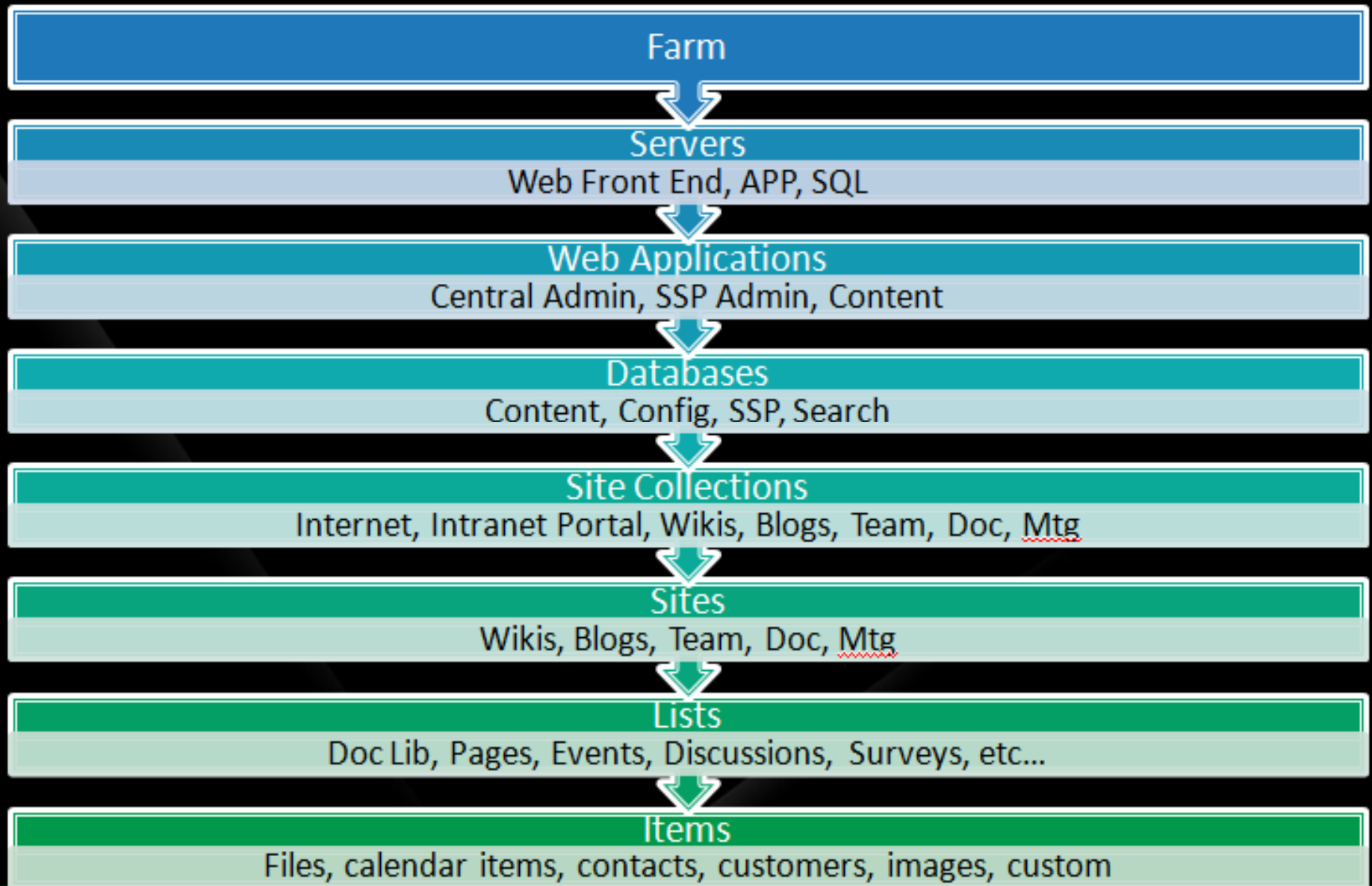
Understanding SharePoint Databases

Farm

- **Config**
  - Servers
  - Web Apps
  - Solutions
  - Global Config

Web App

- **Content 1..2**
  - Site Collections
  - Sites
  - Lists
  - Pages
  - Documents
  - DWPs

SSP

- **Search**
  - Properties
- **SSP**
  - My site host config
  - Profiles
  - BDC config
  - Excel Calc
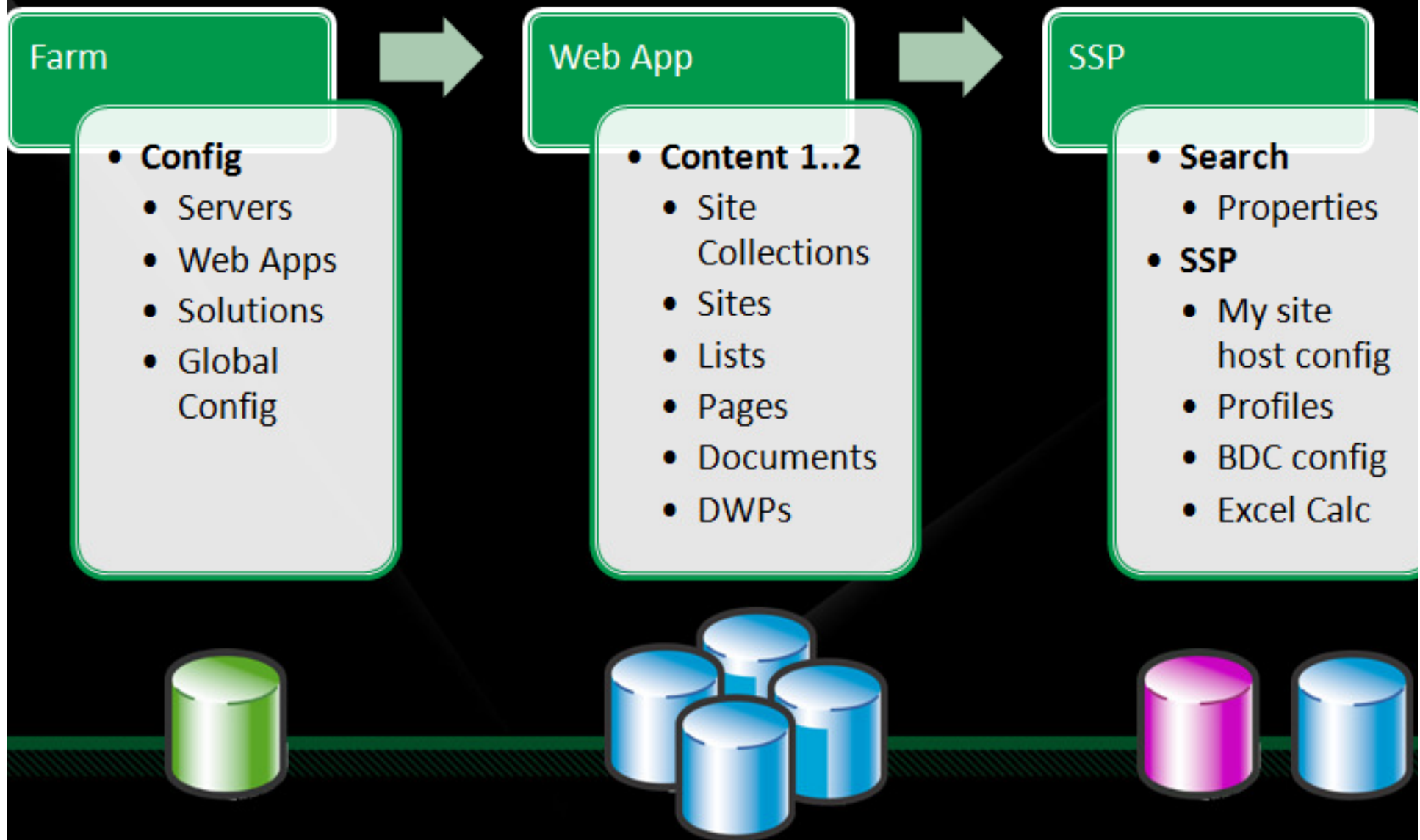
Understanding Content DB

Content Database

Sites

Webs

Doc Stream
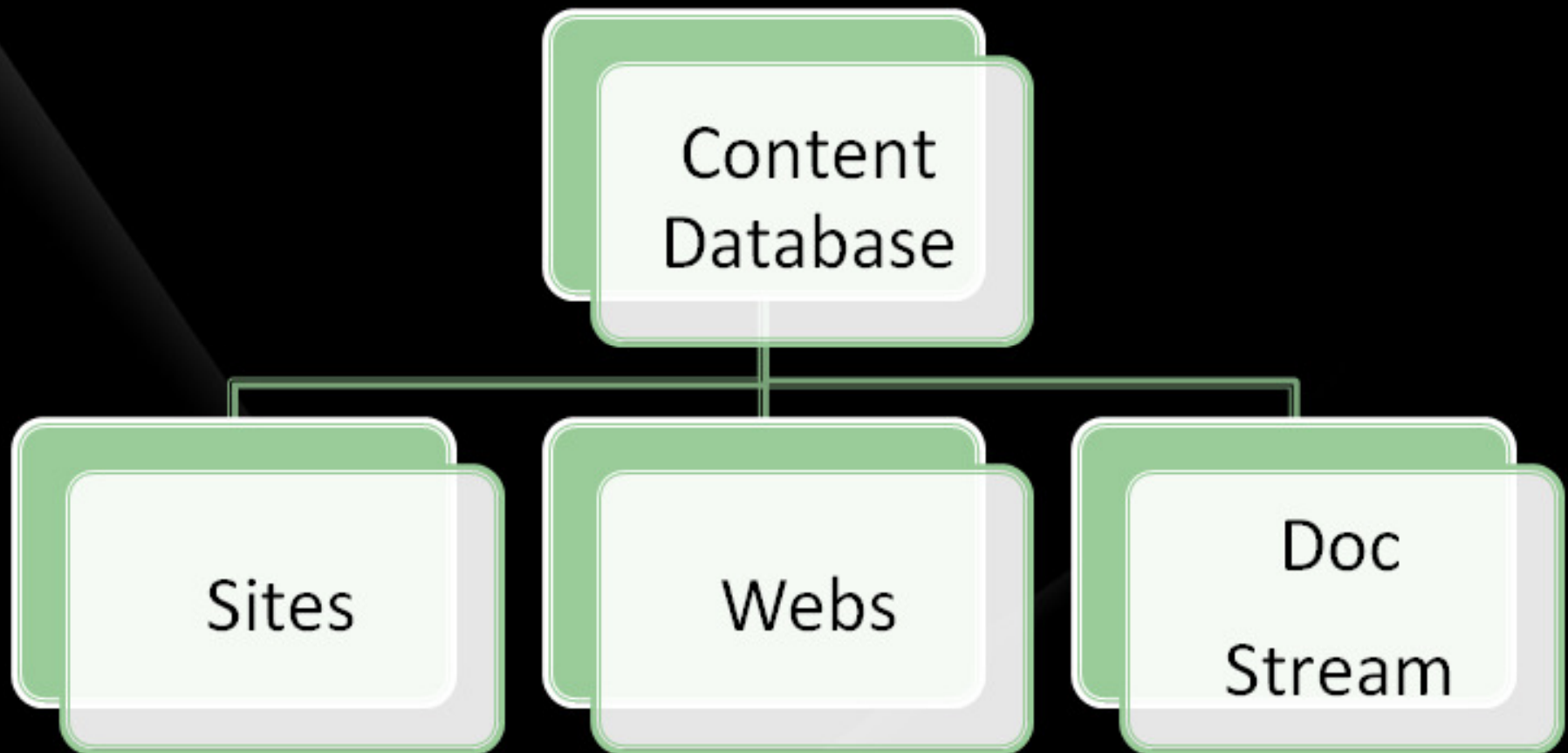
SharePoint Database Performance

Top Performance Killers

1. Indexing/Crawling
2. Backup (SQL & Tape)
3. Profile Import
4. Misc. Timer Jobs – User Sync for large #s of Users
5. STSADM Backup/Restore
6. Large List Operations
7. Heavy User Operation List Import/Write

Architectural Design Considerations

Architectural Design Considerations

- Database Volumes
    - Separate database volumes into unique LUN's consisting of unique physical disk spindles.
    - Prioritize data among faster disks with ranking:
        - SQL TempDB data files
        - Database transaction log files
        - Search database
        - Content databases
    - In a heavily read-oriented portal site, prioritize data over logs.
    - Separate out Search database transaction log from content database transaction logs.

Architectural Design Considerations

- Content Databases
  - **100 content databases per Web application**
  - **100GB per content database**
    - **CAUTION**: Major DB locking issues reported in collaborative DM scenarios above 100GB
      - Need to ensure that you understand the issues based on **number of users**, **usage profiles**, etc...
    - Service Level Agreement (SLA) requirements for backup and restore will also have an impact on this decision.
    - Lab testing completed demonstrated SharePoint performance was NOT impacted by utilizing larger DB sizes; tests included content DB sizes that were **100GB, 150GB, 200GB, 250GB, 300GB and 350GB**.
      - See Appendix for test results!

Architectural Design Considerations

- Content Databases - Continued
  - Pre-construct and pre-size
  - Script generation of empty database objects
  - "Autogrow" feature on
  - Use RAID 5 or RAID 10 logical units
    - RAID 10 is the best choice when cost is not a concern.
    - RAID 5 will be sufficient and will save on costs, since content databases tend to be more read intensive than write intensive.
  - Multi-core computer running SQL Server
    - Primary file group could consist of a data file for each CPU core present in SQL Server.
    - Move each data file to separate logical units consisting of unique physical disk spindles.

Architectural Design Considerations

- Search Database
    - Pre-construct and pre-size
    - Script generation of empty database objects
    - "Autogrow" feature on
    - Use RAID 10 logical units
        - Should be a requirement for large-scale systems
        - Search database is extremely read/write intensive
    - Multi-core computer running SQL Server
        - Primary file group could consist of a data file for each CPU core present in SQL Server.
        - Move each data file to separate logical units consisting of unique physical disk spindles.

GIL3 Server – Servers
(Based on User Counts per Location)

Farm Size	Locations	User Counts
US eHubs	2	22,719
Non-US eHubs	2	1,761
Large (500<x<15,000)	**21/23** *	32,104
Medium (200<x<500)	**19/23** *	7,096
Small (50<x<200)	**54/74** *	7,274
Extra Small (10<x<50)	**65/102** *	2,777
Out of scope (0<x<10)	54	221
Grand Total	280	73,952

* First number includes locations with captured O&P drive data amounts, second number includes all sites (within defined size range)

GIL3 Server – Servers
(Based on User Counts per Location)

Farm Size	Data (Avg)	Data (Min–Max)
US eHubs	27.7 TB	20.4 TB – 34.9 TB
Non-US eHubs	2.0 TB	1.3 TB – 2.7 TB
Large (500<x<15,000)	1.9 TB	12 GB – 6.3 TB
Medium (200<x<500)	620 GB	15 GB – 1.9 TB
Small (50<x<200)	231 GB	66 MB – **1.4** TB
Extra Small (10<x<50)	383 GB	74 MB – 80 GB

SharePoint Large eHub Server Farm

SharePoint Server Farm

End User Access - Site Collection URL

Global load balancing, firewall load balancing and outage detection.

DMZ

Smart DNS Server

Internet

Router

Firewall VPN Server

Smart Web Switch

F5 Load Balanced Front-End Web Servers

F5 Load Balanced Search Servers

Replicated Index Servers

Info Path Servers

Rights Management Servers

Offline Experience Servers

End User Access - Site Collection URL

Cache redirection, local load balancing, server outage detection, Ethernet switching

SQL Database Servers

* Note: F5 is available in London and Singapore

Tier 2 SAN Storage

GIL3 SharePoint Farms – e-Hub

Chevron

e-Hub Design

Collaboration Farm

Web Front-End Servers

Application Servers as needed (e.g. InfoPath)

Clustered SQL Servers

Hitachi SAN Storage

Clustered SQL Servers

MySite Farm

Web Front-End Servers

Clustered SQL Servers

Hitachi SAN Storage

Shared Service Provider (SSP) Farm

Web Front-End Servers

Search Servers

Index Server

Hitachi SAN Storage

Clustered SQL Servers

Notes:

Each Farm can generally scale "wide" with two limitations:
  1 : Only one Index server per Farm
  2 . No more than 8 Web Front ends per SQL Cluster

Backup hw and sw : TBD

DMZ design: TBD – implemented for Early Adopter (Oct 07)

F5 used for load balancing of Web Front-Ends and Search Servers
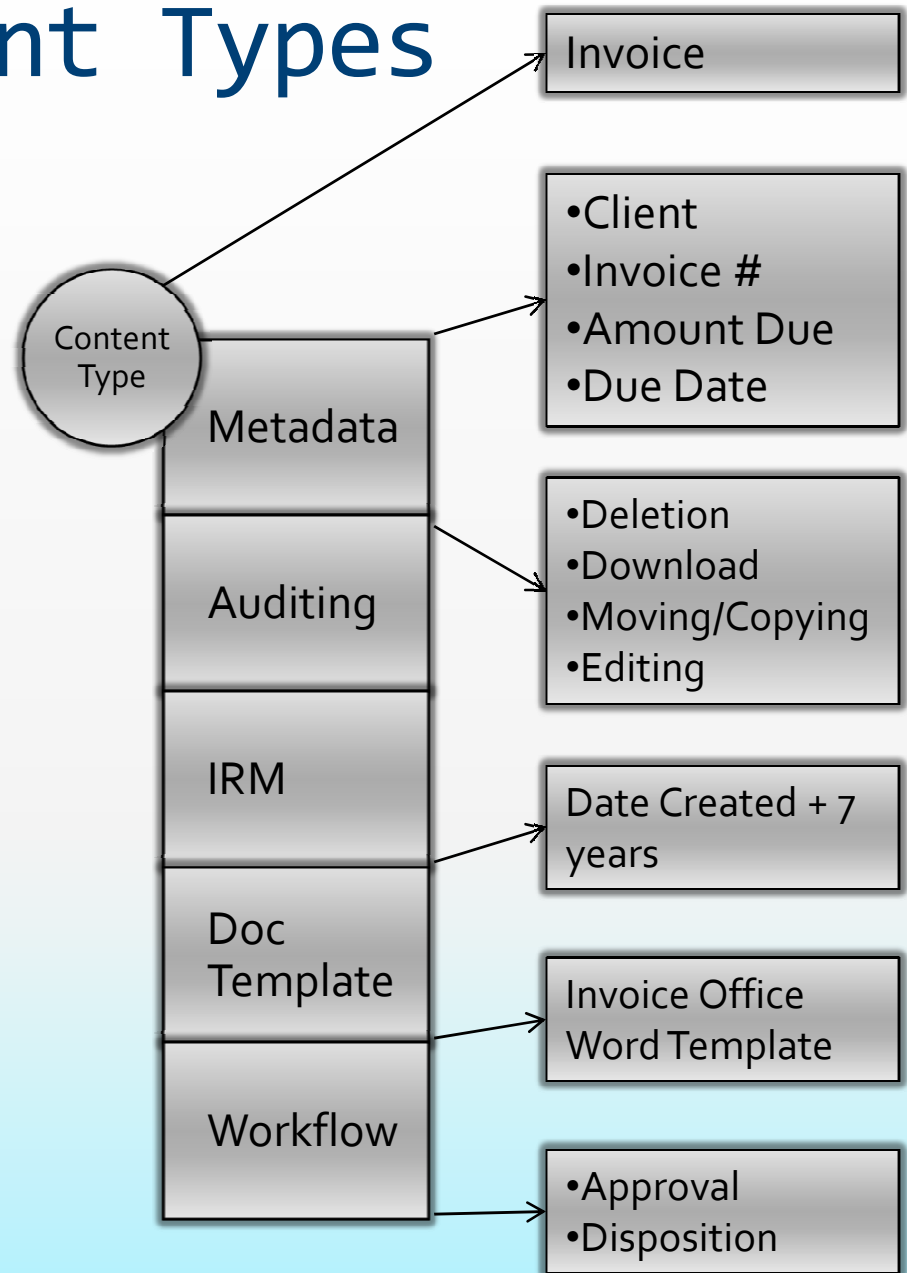
Replication Servers: TBD

SharePoint Terminology 101

- **What is ECM?**
  - Enterprise Content Management
  - This is an electronic method of maintaining files within an organization

- **What is Metadata?**
  - Data about Data
  - Description of a file, for example an Invoice can be described by: Invoice #, Client, Invoice Total, Invoice Date, Airport Code

- **What is a Content Type?**
  - A Type of Document
  - i.e. Email, Fax, Invoice, Contract, Resume, Statement of Work

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SharePoint Content Types

- Define the following:
  - Metadata
  - Auditing
  - Read Only
  - Information Rights Management
  - Workflow
  - Document Template
  - Document Information Panel

Invoice

Content Type

Metadata
- Client
- Invoice #
- Amount Due
- Due Date

Auditing
- Deletion
- Download
- Moving/Copying
- Editing

IRM

Doc Template

Date Created + 7 years

Invoice Office Word Template

Workflow
- Approval
- Disposition

What is the Metadata Model

Global Attributes

Common characteristics that are assigned to all document within SharePoint

Core Attributes

Common characteristics that are assigned to core content types within SharePoint

Extended Attributes

Common characteristics specific to an organization, function or process.

Local Attributes

Unique characteristics that are specific to local business requirements.

- Actual Examples
  - Author, Date Created, Modified By, Type, etc.
  - Site Code: HDQ, IAH, EWR

- Actual Examples
  - Email: Sent Date, Received Date, CC, BC

- Possible Examples
  - Contract Signature Date, Part Number, Invoice Date

- Local Extensions
  - Varies by local need and needs to be defined by the local business units, Country, Region

Creating the Core: Content Types

- To create the core attributes list we leveraged:
  - EPC Group's previous knowledge and experience with best practices
  - Records retention policy established by Legal
  - SharePoint OOTB (out of the box) attributes
  - Attributes identified by team members as they worked and progressed through the design process (we are in the early stages here)

How Many Attributes Does the User Have to Enter?

- Out of 20 attributes, there are 11 that the users never has to enter or update.
  - Out of 9 remaining attributes only 7 are mandatory.
    - Out of 7 that are mandatory, the user will rarely need to change the default. Content Type, Author, Expiration Basis Date, Name, Division, Department, Site Code
- So, what are the remaining 2 attributes that may require user interaction when a user enters a document into the system for the first time?
  - C1 Title or Subject – This is the Title given to the File or Document being uploaded, not required
  - C2 Check in Comment – comments to alert subsequent users of changes made to a particular file, not required

Global Metadata Fundamentals

Name	Description	Default or Auto-Pop	Default/Auto-Pop Comments
Author	Person or entity who created the intellectual content	Yes	From the Author field
Title or Subject	Brief descriptive label or email subject	No	User will input but not required
Item ID	Unique identifier that is the same for all versions of the information item	Yes	System Generated
Name	The filename of the information item	Yes	From the filename as it was on the fileshare
Type	Type of file, icon linked to document	Yes	System Generated
File Size	Size of file uploaded	Yes	System Generated
Division	Division the File Most Relates to	Yes	User inputted field, can also be pulled from AD
Department	Department the File Most Relates to	Yes	User inputted field, can also be pulled from AD
Site Code	Airport the File Most Relates to	Yes	User inputted field

Blue = non mandatory field that user can enter value for
Red = user rarely has to change the default
Black= fields that the user never has to enter or update

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Global Metadata Supporting Records Retention Policy

Name	Description	Default or Auto-Pop	Default/Auto-Pop Comments
Content Type	SharePoint terminology for Document Type	Yes	Default based on library settings
Expiration	Identifies when an information item is due to expire and enter the Disposition Process	Yes	OOTB SharePoint Field
Active Event Date or Retention Basis Date	Date that triggers the calculation of expiration	No	Likely will default to Modified Date

Blue = non mandatory field that user can enter value for
Red = user rarely has to change the default
Black= fields that the user never has to enter or update

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Global Metadata SharePoint System Managed Attributes

Name	Description	Default or Auto-Pop	Default/Auto-Pop Comments
Date Created	Date and time the information was created	Yes	System Generated
Created By	User who put the information into SharePoint	Yes	System Generated
Version	A mechanism designed to preserve information contents and associated attributes if information is changed	Yes	System Generated
Checked Out To	User who has locked the information for editing.	Yes	System Generated
Modified	Last date and time the information was modified/updated	Yes	System Generated
Modified By	Last user who modified/updated the information	Yes	System Generated
Check In Comment	Used to describe changes made during check out	No	None

Blue = non mandatory field that user can enter value for
Red = user rarely has to change the default
Black= fields that the user never has to enter or update

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Core Metadata Supporting Email Content Types

Name	Description	Default or Auto-Pop	Default/Auto-Pop Comments
Received Date	Date the information (e.g. e-mail) was received	Yes if e-mail	If email, from the Received field in Outlook/Exchange
Sent Date	Date the information (e.g. e-mail) was sent	Yes if e-mail	If email, from the Sent field in Outlook/Exchange
Email From	Sender of email message	Yes if e-mail	From the email 'From' field; must be in an email format
Email To	Primary addressee(s) of email message	Yes if e-mail	From the email 'To' field; must be in an email format
Email CC	Secondary addressee(s) of email message	Yes if e-mail	From the email 'CC' field; must be in an email format

Red = non-mandatory fields that many users rarely need to use
Black = fields that the user never has to enter or update

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Core Content Types

Initially all expiration will be + 7 years

Content Type	Legal Retention Policy	Expiration Policy
Document	Active	EBD + 1 year
Bulletin	Active + 1 year	EBD+ 1 year
Calendar	Active + 1 year	EBD+ 1 year
Drawing	?? Active + 10 year	EBD+ 10 year
Email	Active + 60 days	EBD+ 60 days??
Fax	Active	EBD+ ?
General Ledger	Current Year + 3	Created + 3 years
Letter	Active	EBD+ ?
Personal File	Active until employee termination + 7	EBD+ ?
Photo		
Policy	Active + 6	EBD+ 6 years

EBD = Expiration Basis Date

Core Content Types (example)

Content Types	Legal Retention Policy	Expiration Policy
Presentation	Active until Superseded	EBD+ 1 Year
Press Release	? Active + 1 year	EBD+ 1 year
Procedure	Active + 6 years	EBD+ 6 years
Project File	Active + 2 years	EBD+ 2 years
Project Plan	Active + 2 years	EBD+ 2 years
Report	? Active + 1 year	EBD+ 1 year
Voicemail	Active + 30 days	EBD+ 30 years

Expiration Basis Date can be replaced with Modified . This would not allow users to alter the date from which the expiration policy will be based.

Expiration Basis Date allows users more flexibility with their content expiration, which can be a pro and a con.

Real World Examples: Ensuring SharePoint's Success

What makes for a successful SharePoint initiative?

- Proper upfront planning (The System & Information Architecture)

- Looking at the big picture and developing a SharePoint Roadmap for your organization (A Roadmap for 6 months, 12 months, 18 months)

- Executive Sponsorship \ Executive Buy-in

- Enterprise SharePoint Governance: planning and enforcement

- Development of a rock solid environment with a corresponding disaster recovery plan so you do not ever lose your users confidence or their content

- Developing Metadata \ Content Type standards in the initial stages of your initiatives

- Finding and achieving quick wins to "wow" your users

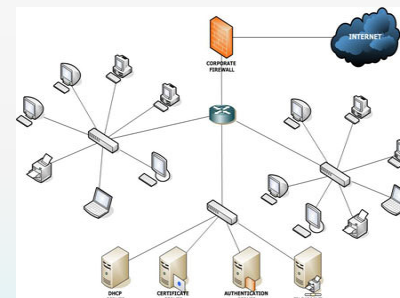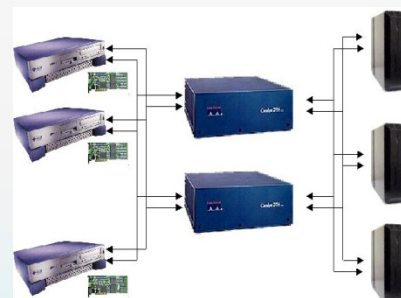epcgroup.net

Your Organization's Governance Model
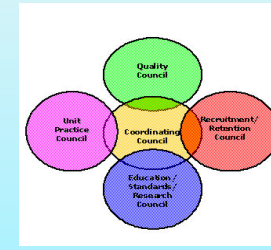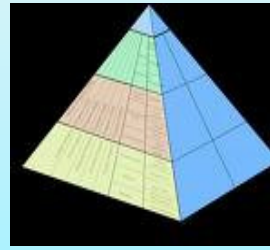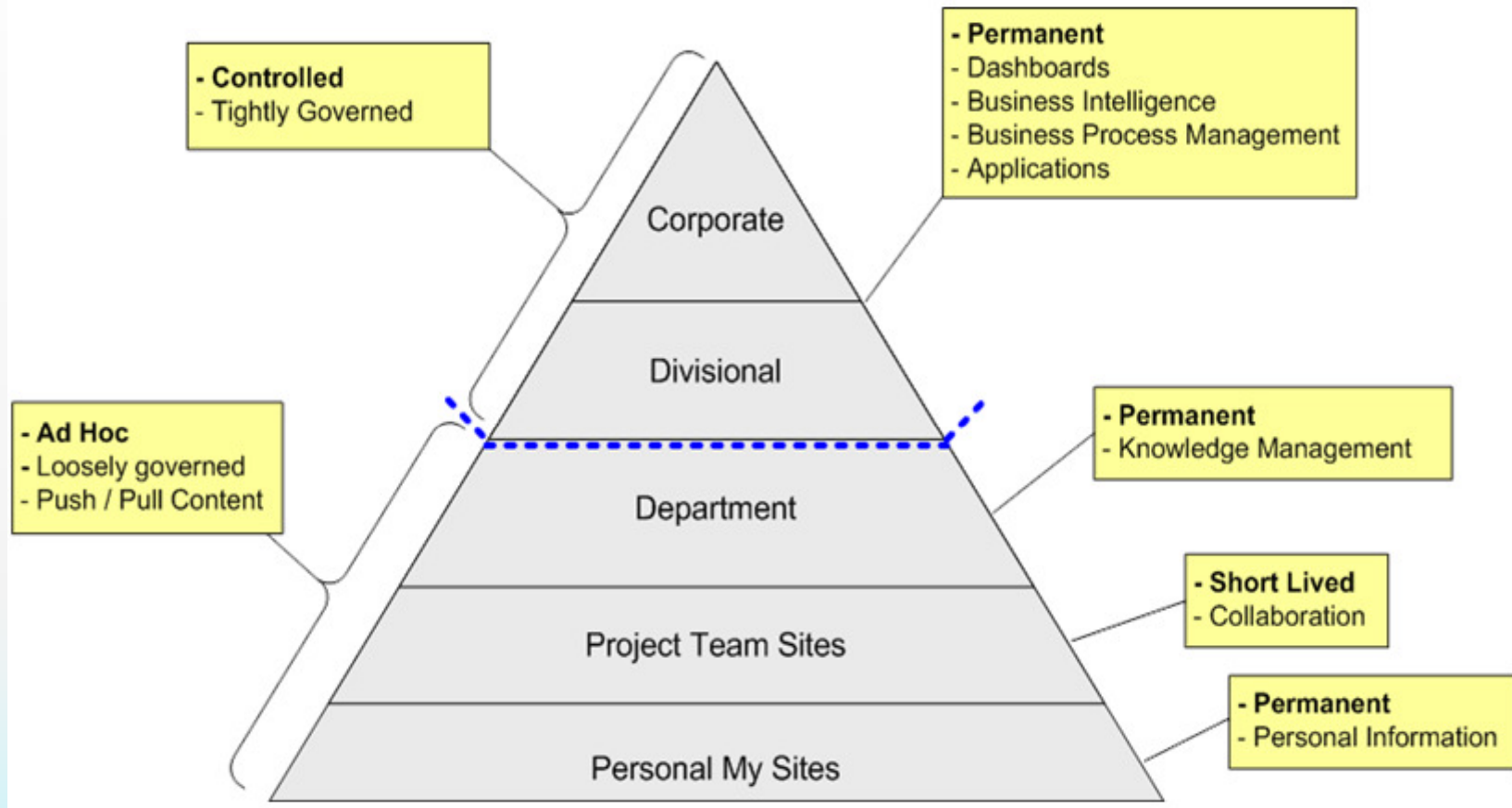
Planning & Designing SharePoint Governance

- The Overall Governance of SharePoint is a critical piece of a SharePoint deployment.

- Consider not only SharePoint's branding and look and feel, but also quotas, file type exclusions, appropriate content policies, My Site management, and site provisioning. This will help you to:

- Develop a governance model that includes the roles of the content owners and teams.

- Develop an organizational communication plan.

- Create portal standards, including development and security standards.

- Set the organization's operational and content management processes.

- Identify end-user support processes and tools.

- Plan monitoring and compliance policies and procedures.

- Manage user requests (new sites and custom development).

- Develop SharePoint branding and look and feel standards (critical)

EPC Group's Best Practices SharePoint Governance

- SharePoint Governance for your environment is absolutely critical

- If you don't enforce Governance in the initial phases of your initiative, its going to be twice as hard to implement down the road BUT it needs to be done regardless of your current state

- At a high level, SharePoint Governance consists of two major areas:
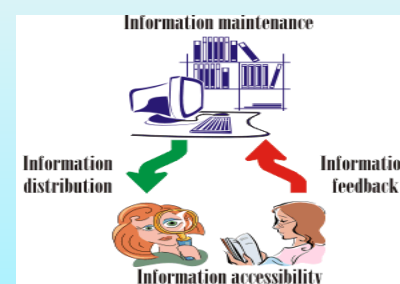
  - **Infrastructure Governance**

  - **Information Management Governance**

EPC Group's Best Practices SharePoint Governance

- From these two major areas, I prefer to break it down further and create 4 major topic areas so that I can start gathering requirements to properly architect and design tailored organizationally specific SharePoint Governance Policies:

1. Environment and Security Governance

2. Custom Development Governance

3. Content Related Governance

4. Administrative and Training Governance

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EPC Group's Best Practices SharePoint Governance (cont..)

The major topic areas contain a large number of granular subtopics:

- **Environment and Security Governance**
  - SharePoint Disaster Recovery Governance
  - Defining SharePoint SLAs
  - Defining SharePoint Maintenance
  - SharePoint Security Governance
  - Site Provisioning Governance
  - Continued…

- **Custom Development Governance**
  - Development of Organizational SharePoint Development Standards
  - Development of Deployment and Code Promotion Requirements
  - SharePoint Branding Governance
  - Third-party Solution or Custom Solution Purchasing Policies
  - SharePoint Designer 2007 Policies and Procedures
  - Continued…

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EPC Group's Best Practices SharePoint Governance (cont..)

The major topic areas contain a large number of granular subtopics:

- **Content Related Governance**
  - Enterprise Content Management Related Policies
  - Site Storage Policies (i.e. Quotas, File Upload limits, etc)
  - My Site Policies
  - Power User and Content Updating Guidelines
  - Executive and Legal Content Policies
  - Document Libraries and List Customization Policies

- **Administrative and Training Governance**
  - SharePoint Training Guidelines
  - SharePoint Communication Plan Guidelines
  - SharePoint Committee Policies
  - Enterprise SharePoint Support Model
  - Executive Dashboard \ SharePoint Reporting Guidelines
  - Continued...

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MySite Governance is Critical!

- My Site templates and custom site definitions can be created to minimize these risks, but organizations should adhere to the following standards during their My Site rollout:

  - All My Site Public View content must contain only work-related material. This includes work-related documents, discussions, pictures, links, calendar events, and related content.

  - No My Site Public View content can contain any confidential or private data. If the organization would not allow all users within the company with a domain login to view this information, consider whether it should be on your My Site Public View.

  - Content pertaining to human resources or legal is typically considered confidential and should not be listed on My Site Public View.

  - Financial data must be reviewed prior to its posting on My Site Public View.

  - Content on the private site must not contain personal audio files, inappropriate pictures, or other materials not allowed within the organization.

  - All discussions or blogging done within a My Site must follow company policies and must not contain sensitive company material or defamatory comments about any person within the organization.

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Site & Workspace Governance Cont…

- All site content should be periodically monitored for your specific set of banned words or phrases.

- A SharePoint Change Management Plan should be developed and implemented.

- Top-level navigation should be vetted and agreed upon by all stakeholders to allow for easy navigation throughout SharePoint

- RSS (Really Simple Syndication)feeds should be limited to content related to the organization.

- Blogs must not contain defamatory content about the company or employees within the organization.

- Users must agree to "SharePoint User Agreement" prior to accessing the SharePoint environment

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Site & Workspace Governance Cont...

- A file-type exclusion list should be implemented within sites to avoid non-organizational or possibly harmful files from entering the environment.

- Custom search scopes should be identified and created to assist users to quickly find their data.

- Version control should be turned on within all document libraries along with major and minor versions when the environment—for example, storage capacity—allows.

- Avoid breaking inheritance whenever possible from all subsites, libraries, and lists. A broken inheritance should be centrally documented and tracked.

- Site provisioning policies and procedures should be developed as well as consideration around a centralized site creation process or possible automated process.

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Site & Workspace Governance Cont…

- Make sure all executive sites -(concerning the CEO, CIO, CFO, and so on) and their related content are excluded from search except in public announcements or areas that are specifically set up to share their content (note that this could be relevant for human resources and legal as well).

- Whenever possible, site templates should be developed for departments or projects sites to improve standardization.

- SharePoint Designer 2007 customizations should be tightly monitored and controlled by specific groups within the organization.

- Develop a policy to answer the questions, "How does third-party SharePoint-related software get introduced within the organization? Who will approve it and who pays for the cost of the software, its testing, and its implementation?"

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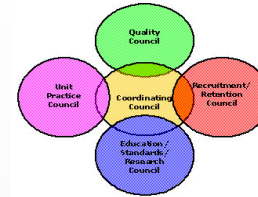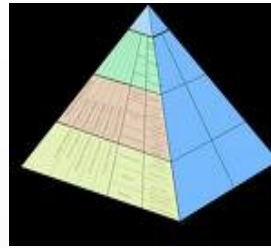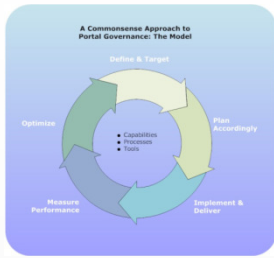
SharePoint Operational Governance

Building a SharePoint Charge Back Model

- At what level do I enable **self service**?
  - Where do I want IT to Step In.
- What **quota** should I allow?
- How will data or sites be **expired**?
- How will I provide **search** or **browse**?
- What **customizations/dev** will I allow?
- How will I manage and support the adhoc **unstructured collaboration**?

Self Service
Smaller Quota
Quicker Expiration
OOB

IT Provisioned
Larger Quota
Permanent
Supported Dev env.
$$$ Charge Back

Adhoc ← → Structured

Tiered Service Offerings/Hosting

Site Collection
- To Support 100-100K+ sites
- Ideal for Web 2.0 & Collaborative environments

Web App
- Ideal for point solutions, departments, and groups of site collections
- Namespace and relationship autonomy

Dedicated Server
- Ideal for highly customized environments
- Great for staged deployments i.e. authoring to production

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Examples of a SharePoint Charge Back Model

SharePoint As A Service

Basic

- Low cost to Free (low barrier)
- Self Service (w/ meta data capture or workflow)
- Fixed Quotas
- SharePoint Designer (optional)
- Out of box templates + Application Templates

Advanced

- $ Charge Back
- Multi Tenant
- Web App/App Pool
- No GAC access
- Custom Site Templates
- Limited LOB Integration

Premium

- $$$ Charge back
- Dedicated
- Virtual or Physical Separation
- Custom LOB Integration
- Business Focused Dev
- Dev/Test environments

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Examples of a SharePoint Charge Back Model

SharePoint As A Service		
Gold Offering	Silver Offering	Platinum Offering

SharePoint's Features:
Developing a Charge Back Model

Portal	Collaboration	Content Management	Search	Business Processes	Business Intelligence	Service Related Features
• **RSS Content Syndication** • **Privacy & security** • **Audience Targeting (by group only)** • **Site and document aggregation** • **Site Manager** • **Mobile Device Support** • **Portal Site Templates** • **SharePoint sites and Documents Roll up web parts** • **Client integration** • **Integration with SharePoint designer (except site backup and restore)**	• **All Standard templates** • **Wikis** • **Blogs** • **People and groups lists** • **Calendars** • **Email Integration** • **Task Coordination** • **Surveys** • **Document Collaboration** • **Issue Tracking**	• **Business Document Workflow Support** • **Document Information Panel** • **Document Action Bar Document Information Panel** • **Retention and Auditing policies** • **Navigation controls** • **Content authoring** • **Page Layouts** • **Site variations** • **Slide Libraries** • **Document Management Site Templates**	• **UI** • **Search Results** • **Relevance** • **Security**	• **Forms libraries** • **Custom non-code workflows**	• **Integrated business intelligence dashboards** • **Key performance indicators** • **Filter web parts** • **Integrated flexible spreadsheet publishing** • **Share manage and control spreadsheets** • **Web-based business intelligence using excel services** • **Data connection libraries** • **Business Data Catalog** • **Business data web parts** • **Business data actions** • **Report center**	• **Multiple Site Collections per customer** • **Manage Site Collection Features and quota** • **Microsoftonline.com domain** • **Separate host-header per site collection** • **Authenticated access only** • **Off-boarding of customer data** • **Security-trimmed site list on company home page**
• My Site Personal Site • Site Directory • User Profiles and the profile store • Extranet Access • Colleagues and memberships web parts	• Social Networking Web part • Mail enabled lists • Real time presence and communication	• Content publishing and deployment • Content Management Site templates • Policies, auditing and compliance • Records Repository • Email content as records • legal holds • Integration with Microsoft information rights management (IRM) • WYSIWIG Web Content Editor • Content Staging	• People search • Business Data Search • Enterprise content sources • Cross site-collection search • Admin & Management • Indexing Controls	• out-of-the-box workflows • Custom code workflows • Browser based forms • Centralized forms management and control • Design once development model • Form import wizard • Integrated deployment model for no-code forms • Compatibility Checker		• Anonymous Access • Vanity domains • managed path information architecture • tenant admin across site collections

Developing Your Charge Back Model: Pricing Examples

Service Offerings	List USL Price (Monthly per User)	List Step-Up USL Price (Monthly per User)
Exchange Deskless Worker	$2.00	No Step-Up
SharePoint Deskless Worker	$2.00	No Step-Up
***Deskless Worker Suite (25% Discount)**	$3.00	No Step-Up
Exchange Online Standard	$10.00	$8.61
Office SharePoint Online Standard	$7.25	$5.32
Office Communications Online (Instant Messaging & Presence)	$2.50	$1.86
Office Live Meeting	$4.50	$2.95
BPO Suite (38% Discount) • **Exchange Online Standard** • **Office SharePoint Online Standard** • **Office Communications Online** • **Office Live Meeting Online**	$15.00	$12.15 (from CoreCAL) $9.93 (from ECAL)

"Attached " Service Offerings	Add-On USL
Additional Exchange Storage (Can't be attached to Deskless Worker SKU)	$2.50/GB
Additional SharePoint Storage (Can't be attached to Deskless Worker SKU)	$2.50/GB

* Deskless Worker SKU's to be released later in the Fiscal Year

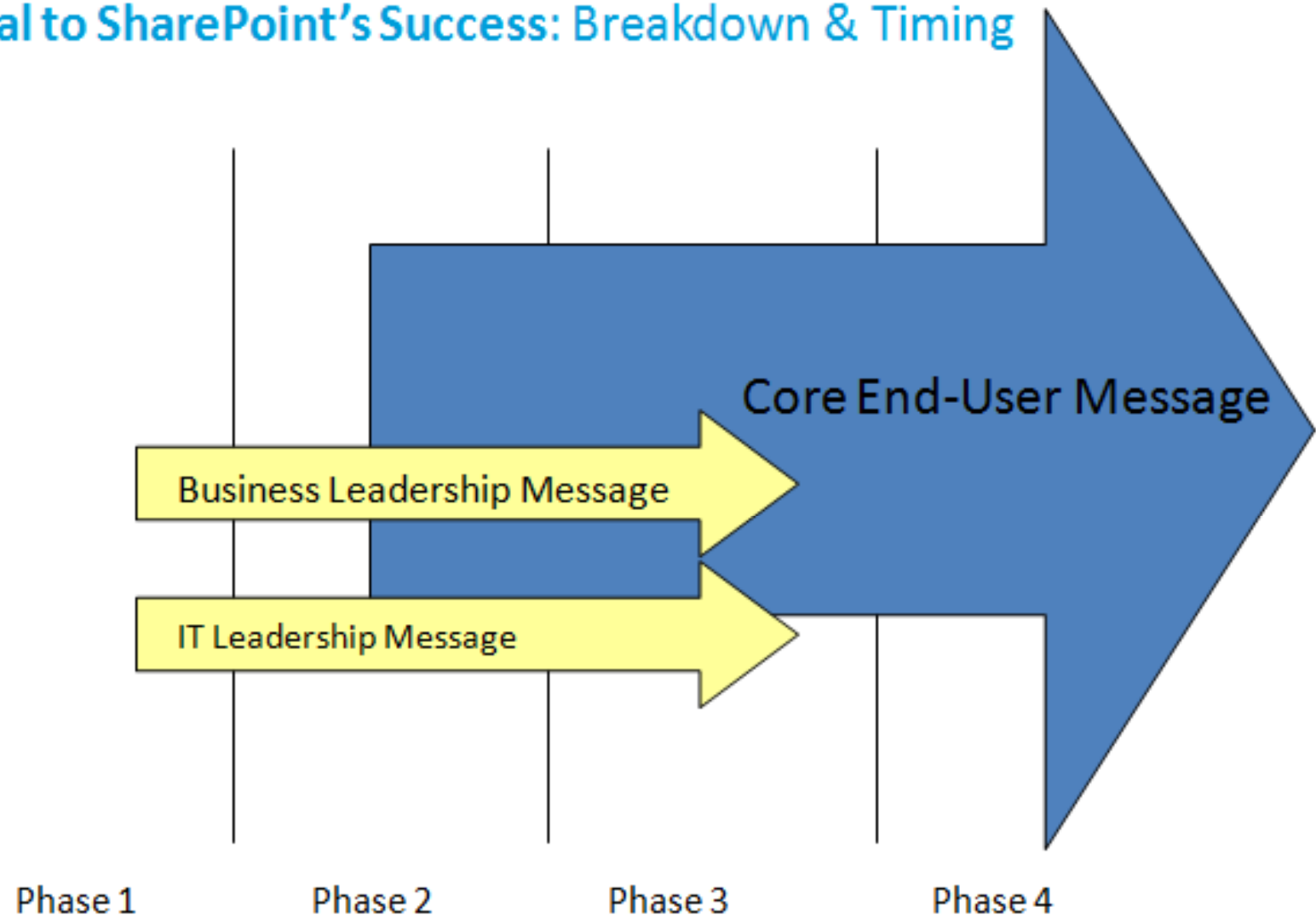# Your Organization's SharePoint Service Level Agreement (SLA)

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If a site gets deleted at 3:00pm in the afternoon and IT has to restore it from yesterday's backup (at 1am)... Users who performed any work that day are going to loose their data and you are going to have a hard time gaining their trust enough again to have them store anything of value in SharePoint Over the past few months, I have asked the question on acceptable downtime for SharePoint to several of EPC Group's clients and the average answer was approximately 4 hours
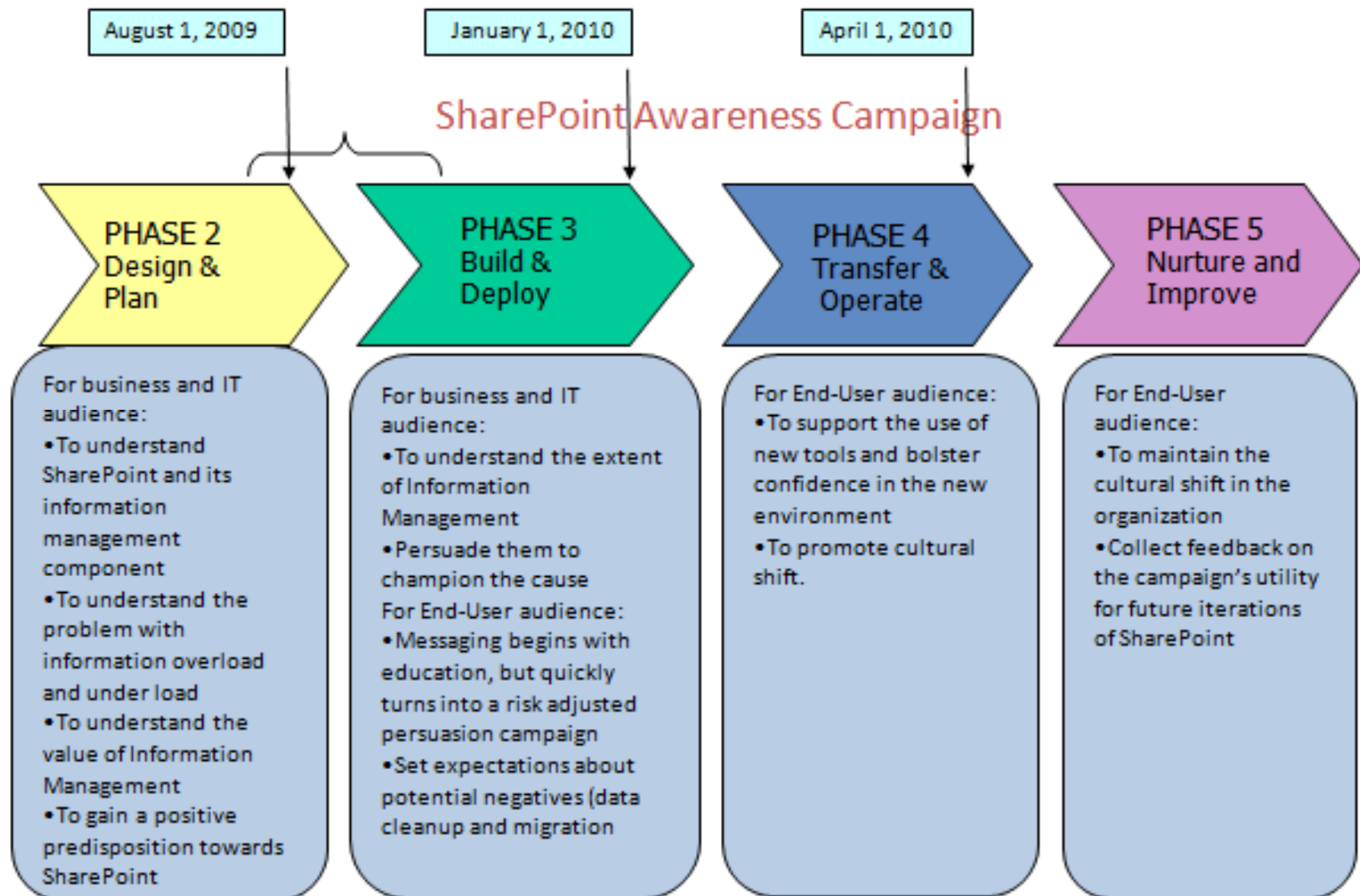
The SharePoint Communication and Public Relation Plan

"Awareness Campaign for Business Users and the IT Community"

Communication and a Continuous PR Campaign Messages Are Critical to SharePoint's Success: Breakdown & Timing

Core End-User Message

Business Leadership Message

IT Leadership Message

Phase 1   Phase 2   Phase 3   Phase 4

PR Objective by Phase (Example)

August 1, 2009

January 1, 2010

April 1, 2010

SharePoint Awareness Campaign

PHASE 2
Design & Plan

PHASE 3
Build & Deploy

PHASE 4
Transfer & Operate

PHASE 5
Nurture and Improve

For business and IT audience:
- To understand SharePoint and its information management component
- To understand the problem with information overload and under load
- To understand the value of Information Management
- To gain a positive predisposition towards SharePoint

For business and IT audience:
- To understand the extent of Information Management
- Persuade them to champion the cause
For End-User audience:
- Messaging begins with education, but quickly turns into a risk adjusted persuasion campaign
- Set expectations about potential negatives (data cleanup and migration

For End-User audience:
- To support the use of new tools and bolster confidence in the new environment
- To promote cultural shift.

For End-User audience:
- To maintain the cultural shift in the organization
- Collect feedback on the campaign's utility for future iterations of SharePoint
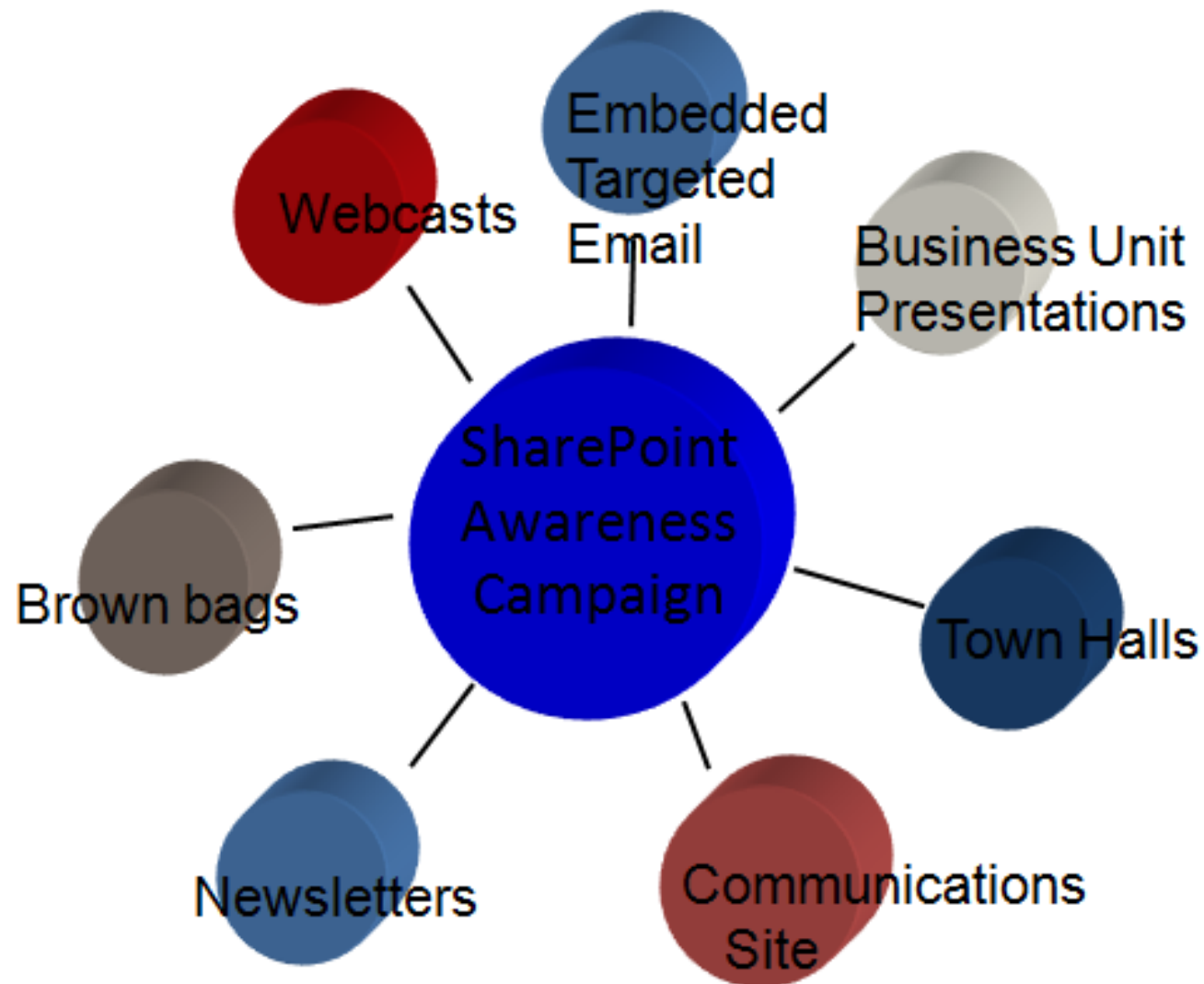
Educate and persuade your organization's users to adopt SharePoint

SharePoint Awareness Campaign

- The SharePoint Awareness campaign for business and IT users is only part of the overall PR campaign which spans the entire project's lifecycle.

- Awareness and Understanding lay the foundation for persuasion that must take place for SharePoint can be adopted quickly and consistently which helps the various audiences reach their goals more efficiently.

- For the enterprise it means realizing protection from Information Management risk sooner and leveraging financial gain from the resulting productivity.

Awareness Campaign Communication Channels

Embedded Targeted Email

Webcasts

Business Unit Presentations

SharePoint Awareness Campaign

Brown bags

Town Halls

Newsletters

Communications Site

One Message ..... *Seven* Different Ways

Awareness Campaign Audience Focus

Five Month Campaign

	Webcast	Target Emails	Brown Bags	Business Presentations	Comm. Site	Newsletter
Management/Critical Stakeholders • IT Leadership • Key IT Managers • Business Unit Leaders	Launches Campaign	Weekly Following launch of Webcast)			Ad hoc	Monthly
IT & Extended IT Community			Biweekly			
Key IT Organizations • IT Global Delivery • Legal & Compliance • IT Support						
Key IT Projects						
Information Management Champions/Coordinators Power Users & PMs						
Business Leadership • Organizationally Defined Roles... • Organizationally Defined Roles... • Organizationally Defined Roles...				BU Value Presentations and Town halls		

5-month Awareness Campaign Activities

Target Dates
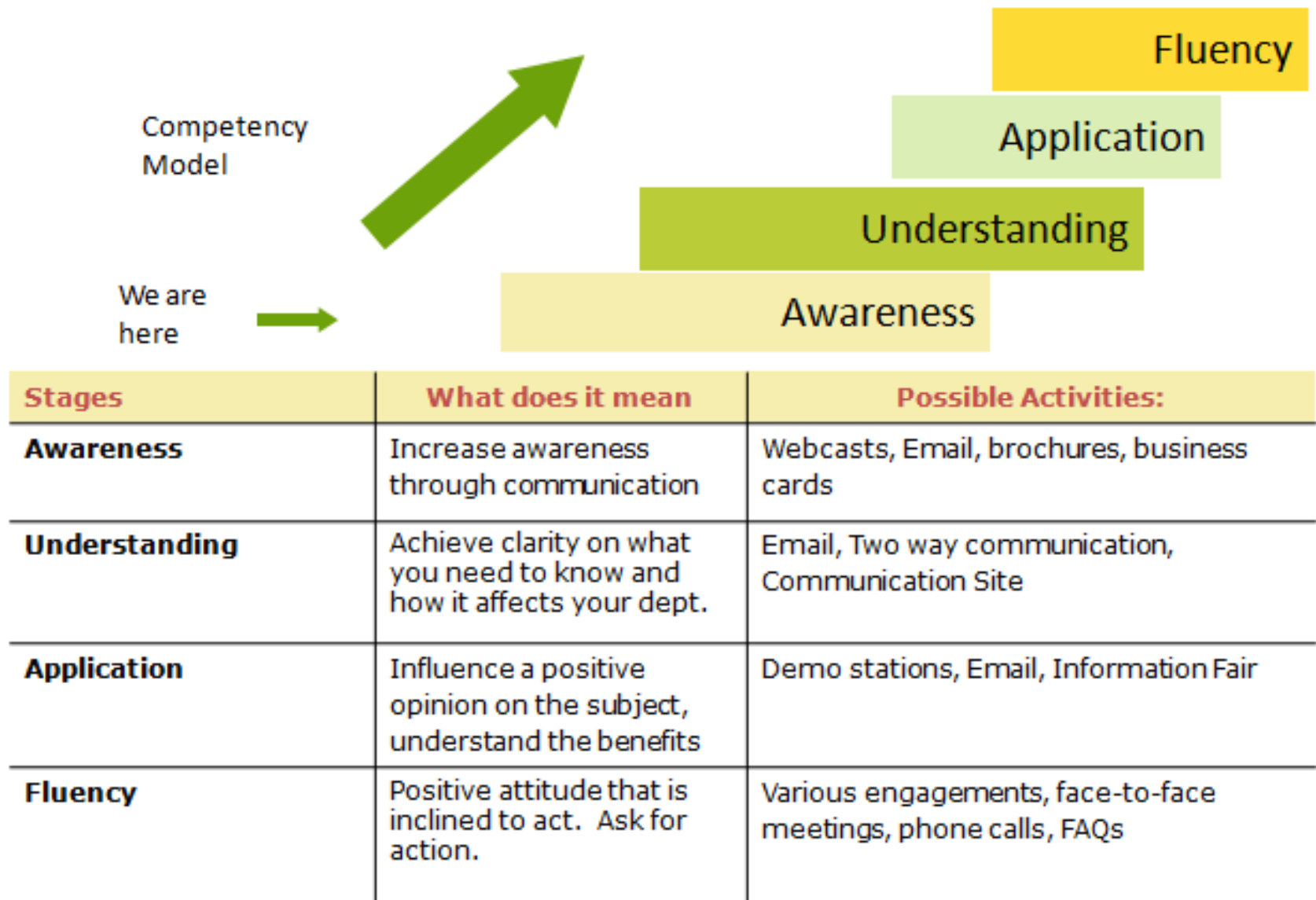
TBD	Webcast 1.0 - What is SharePoint? Launch of SharePoint Awareness Campaign
TBD	Email 1 - What is the Problem?
TBD	Email 2 - What is Information Management?
TBD	Email 3 - Getting there before the competition
TBD	Email 4 - How SharePoint can solve the problem
TBD	Email 5 - A look at the future
TBD	Brownbag 1 – SharePoint End User Demo / Brownbag 2 – SharePoint Power User Demo
TBD	BU Value Proposition Presentations & Townhalls
	BU # 1 / BU # 2 / BU # 3 / BU # 4 / BU # 5
Ongoing	Ad hoc Web site Updates / Monthly Newsletter

SharePoint Monthly Newsletter

- Monthly Newsletter will support and further SharePoint Awareness Campaign messaging

Project Highlights	
■ Most recent project developments ■ Team member/group of the month	
Information Management Topics (Examples)	**New Functionalities**
■ SAP and SOX implications and other legal issues ■ Records management process ■ KM within the organization ■ Retention schedules ■ Team Sites	■ Search ■ SharePoint ■ Demo of the Month ■ My Sites ■ Social Networking \ KM Functionality

SharePoint Competency Model (Example)

Competency
Model

We are
here

Fluency

Application

Understanding

Awareness

Stages	What does it mean	Possible Activities:
Awareness	Increase awareness through communication	Webcasts, Email, brochures, business cards
Understanding	Achieve clarity on what you need to know and how it affects your dept.	Email, Two way communication, Communication Site
Application	Influence a positive opinion on the subject, understand the benefits	Demo stations, Email, Information Fair
Fluency	Positive attitude that is inclined to act. Ask for action.	Various engagements, face-to-face meetings, phone calls, FAQs

Enabling Power Users

How to spread the load by delegating to 'Power Users' in your organization

The Power User Analogy

"The Mall Manager"

"The Store Owner"

A SharePoint Administrator

A SharePoint Power User

SharePoint Roles (Example)

Role	Responsibilities and Tasks	Permissions	Candidate Example
SharePoint Administrator	Responsible for global SharePoint configuration, shared services, policies, procedures. Responsible for translating business needs addressed by the Project Team into initiatives for the portal and coordinating Portal Administrator efforts. • Provide architectural guidance to development • Configuration of SharePoint • Possibly responsible for MOSS database, site collection, and site backups for local server. • Enforce site standards (layouts, security processes, etc.) • Local contact for local employees • Site provisioning solution configuration • Manage project risks, and escalate incidents to the team as necessary • Work with the Infrastructure Team to develop infrastructure and operation best practices • Work with System Administrators to develop best practices	• Local MOSS site collection administrator. • Total access to the entire MOSS Site Collection(s) and all sites. • Total access to portal and site configuration settings. • Has system administrative or SQL administration rights. Note: This may be delegated the DBA team once SharePoint is in production	
Power User	Primary and Secondary site owner. • Manages site layout and structure • Mediator of site content • Policing of sites and subsites to enforce governance policy • Responsible for portal area content. • Content creation	• Grant access to this site • No sub site creation rights • Web designer permissions	a Departmental site admin; anyone in the company with the required SharePoint security knowledge; typically this person would also be the site owner if they are responsible for content
Contributor	• Content creation		
Reader		Has read-only access to content	

SharePoint Roles (Example)

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Reader		Has read-only access to content	

Delegating Site Management to Power Users

- Power users are key to the success of your organization's SharePoint implementation.

- Site update tasks must be assigned to a specific power user or users so that site content stays up to date and relevant.

- A power user should be very familiar with how SharePoint works and have either Full Control or Design permissions (or their equivalent) for the site they will manage.
  - Note: Site Deletion Permission is usually restricted from Power Users

Delegation of Site Management Tasks to Power Users

- Tasks that should be delegated to power users include:
    - Managing Web Parts within a site
    - Updating the List View Web Parts on the page to make sure the content that is displayed within them—which is what is most visible to the user base—is updated and accurate
    - Managing all existing lists and libraries and their content within the site
    - Creating new lists or libraries based on new requirements or user requests

- Additional Tasks that could be delegated:
    - Creating subsites within existing sites
    - Managing the user base of the SharePoint site
    - Customizing the navigation (that is, the Quick Launch and Top Link bars) of a site
    - Creating new workflows & managing site content types

Planning Content Administration

- Your organization's power users should be empowered and proactive about content administration.

- Proper content administration planning can drastically reduce the time and cost involved in site content administration.

- If you can count on your power users to manage the majority of user requests and keep site content up to date, you will have a much more efficient and successful SharePoint environment within your organization.

- Power users will also lessen requests and calls into an organization's help desk, allowing IT to focus on supporting other systems within your organization.

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SharePoint Help Desk Policies & Procedures

- Require that all help desk tickets related to SharePoint have the related Site URL stored within the ticket

- Make sure all help desk members understand the procedures for assist a user that has "deleted or lost" a file that was stored in SharePoint

- Make sure all help desk members know what to do in the case that a team, department, or group requests "A new Team Site" or asks the question, "How do we get a new Team Site"

- Require all help desk members to have a copy of the SharePoint Disaster Recovery Procedures

- Require the user to communicate to the help desk what level of SharePoint security they currently have applied to their user account (i.e. standard user, web designer, administrator, etc.)

- Communicate to the users that they should leverage the "**SharePoint FAQ**" and "**SharePoint Glossary**" sections of the SharePoint Training Site

- Ensure all members of the help desk understand how to capture custom development or configuration requests

Who Helps the Help Desk?

- The Help Desk can utilize the "**SharePoint FAQ**" and "**SharePoint Glossary**" but what happens when that doesn't resolve the issue?
  - What is your organization's next layer of SharePoint support?

Who Helps the Help Desk?

Who Helps the Help Desk?

Who Helps the Help Desk?

Who Helps the Help Desk?

Help Desk

SharePoint Power User

- There are frequent situations where a Power User could handle non-administrative tasks in their site \ department \ region

- Users, new to SharePoint, account for a large number of the SharePoint related Help Desk tickets

- How could a Power User help those users? (Initial training, mentoring, etc).